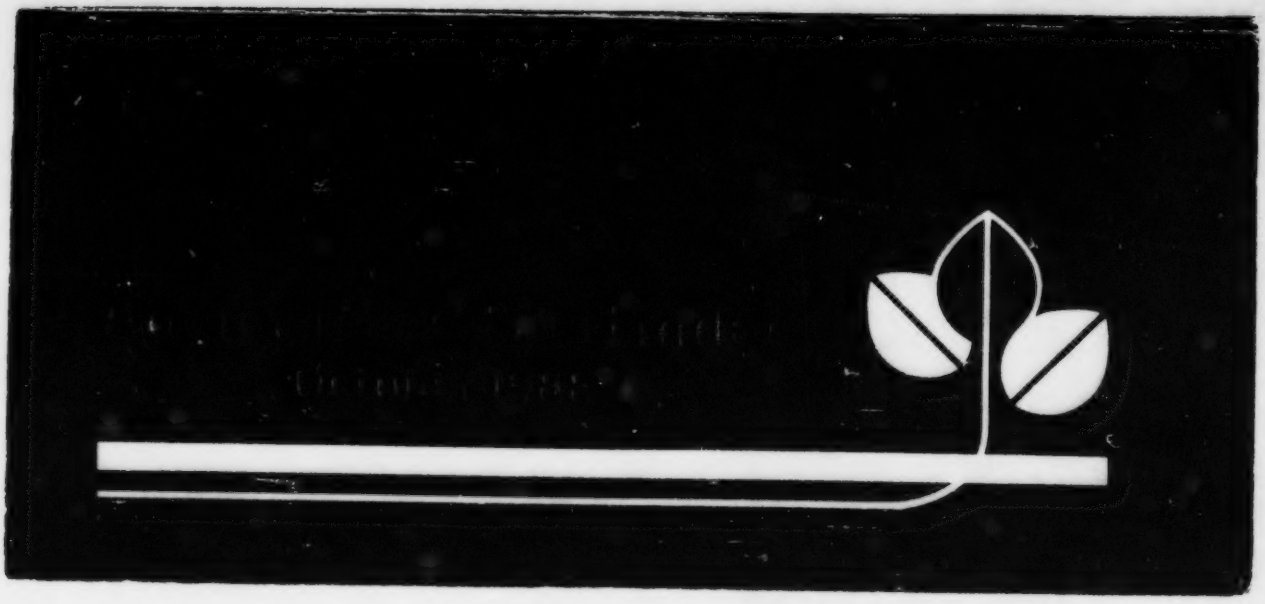

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CANADIAN AGRICULTURE IN THE GLOBAL CONTEXT

AGRICULTURE'S SHARE IN DISTRIBUTION OF GDP – SELECTED COUNTRIES (%)

	1965	1985
Canada	5	3
United Kingdom	3	2
France	8	4
Japan	9	3
Australia	11	4
United States	3	2
China	39	33
India	47	31
Brazil	19	13

Source: World Bank, World Development Report 1987

AVERAGE ANNUAL GROWTH IN AGRICULTURAL PRODUCTION – SELECTED COUNTRIES (%)

	1965-80	1980-85
Canada	1.6	0.5
United Kingdom	1.7	3.2
France	0.8	3.1
Japan	0.8	1.6
Australia	2.6	3.9
United States	1.3	1.8
China	3.0	9.4
India	2.8	2.7
Brazil	4.7	3.0

Source: World Bank, World Development Report 1987

VALUE ADDED IN AGRICULTURE – SELECTED COUNTRIES (U.S. $ mil., 1980)

	1970	1985
Canada	8 501	10 634
United Kingdom	7 907	11 476
France	24 070	30 219
Japan	39 216	41 435
Australia	7 090	10 377
United States	61 880	85 063
China	69 147	139 482
India	46 456	61 710
Brazil	18 425	37 540

Source: World Bank, World Development Report 1987

CANADA'S SHARE OF WORLD AGRICULTURAL EXPORTS

	1982-84 Average	1985	1986
Total world agricultural exports (U.S. $ mil.)	214 501	208 584	226 505
Canadian agricultural exports (U.S. $ mil.)	8 262	6 996	6 657
Canada's share of total (%)	3.8	3.4	2.9

Source: Food and Agriculture Organization of the United Nations, Trade Yearbook 1986

NATIONAL OVERVIEW OF CANADIAN AGRICULTURE, 1987

Total land	997 million hectares
Farm land	67.8 million hectares (1986)
Improved land	46.0 million hectares (1986)
Unimproved land	21.8 million hectares (1986)
Population	25 309 331 – 76% urban, 24% rural, 4% on farms (1986)
Number of farms	293 089 (average size: 231 ha) (1986)
Capital value	$197.8 billion
Debt outstanding	$22.9 billion (1986)
Farm cash receipts	$20.9 billion
Farm expenses	$15.6 billion
Realized net farm income[1]	$5.5 billion
Direct government payments[2]	$3.8 billion
Federal agri-food expenditures	$4.5 billion (1986-87)
Agricultural production	About 3% of gross domestic product
Agri-food sector	About 10% of gross domestic product – employs about 15% of Canadians
Agricultural exports	$8.9 billion
Agricultural imports	$6.8 billion
Agricultural trade balance	$2.1 billion

[1] Includes government payments
[2] Federal and provincial

PRICES OF SELECTED FARM PRODUCTS

Item	1983	1984	1985	1986	1987
Wheat, No. 1 CWRS Thunder Bay CWB final realized price ($/t)[a]	192.34	193.98	186.37	160.00	130.00
Barley, No. 1 feed, Thunder Bay CWB final realized price ($/t)[a]	110.00	138.02	131.30	110.00	80.00
Rapeseed, No. 1 Can. (Vancouver ($/t))[a]	439.11	387.32	303.02	239.89	267.00
Corn, No. 2, C.E., Chatham elevator[a]	160.07	139.02	114.79	87.34	80.90
Soybeans, No. 2 or better, Chatham elevator ($/t)a	344.00	270.00	242.60	232.42	257.00
Feeder cattle, Edmonton 600-700 lbs ($/100 lbs)	78.44	80.40	81.33	87.94	105.94
Steers, A1, A2, Toronto ($/100 lbs)	78.98	85.30	81.63	82.66	88.89
Veal, good, Toronto ($/100 lbs)	79.10	82.66	80.16	82.32	89.44

PRICES OF SELECTED FARM PRODUCTS (Concluded)

Item	1983	1984	1985	1986	1987
Hogs, dressed, index 100, Toronto ($/100 lbs)	70.75	72.65	68.51	81.38	79.61
Lambs, A and B, Toronto ($/100 lbs)	77.28	86.18	96.75	106.73	112.70
Chicken broilers, live price, Ontario (cents/lb)	48.9	53.6	49.3	49.6	47.4
Turkey broilers, live price, Ontario (cents/lb)	64.3	69.7	66.9	65.9	63.7
Eggs, A large, producer price, Ontario (cents/doz)	97.1	103.9	99.3	96.7	94.5
Ind. milk, gross target return ($/hL)	42.07	44.01	45.04	45.94	46.48

[a] Prices are for crop years; for example 1986-87 is shown as 1987.

Source: Agriculture Canada, Policy Branch, Handbook of Selected Agricultural Statistics.

EMPLOYMENT IN THE AGRI-FOOD SECTOR, 1987

Industry	Employment	Industry	Employment
Total	11 995 000	Wholesale	
		Farm products	11 000
Agriculture	475 000	Food, beverage, soft drinks	68 000
		Farm machinery	24 000
Processing			
Food and beverage	254 000	Retail	
Tobacco products	6 000	Food stores	339 000
		Florists' shops	18 000
Inputs		Liquor, wine and beer	22 000
Agricultural implements	9 000		
Mixed fertilizers	5 000	Foodservice	
		Restaurants, caterers and taverns	542 000
Storage			
Grain elevators	7 000	TOTAL AGRI-FOOD	1 781 000
		Share (%)	14.9

Source: Statistics Canada, Labor Force Survey

REGIONAL OVERVIEW

NUMBER OF FARMS BY PROVINCE

	1976	1981	1984	1986
Canada	338 578	318 361	313 490	293 089
Newfoundland	. 878	679	660	651
Prince Edward Island	3 677	3 154	3 030	2 833
Nova Scotia	5 434	5 045	5 000	4 283
New Brunswick	4 551	4 063	4 000	3 554
Quebec	51 587	48 144	47 400	41 448
Ontario	88 801	82 448	81 700	72 713
Manitoba	32 104	29 442	29 000	27 336
Saskatchewan	70 958	67 318	66 000	63 431
Alberta	61 130	58 056	56 700	57 777
British Columbia	19 432	20 012	20 000	19 063

Source: Statistics Canada, Census of Agriculture

FARM CASH RECEIPTS FROM FARMING OPERATIONS[1], BY PROVINCE ($'000)

	Average 1981-85	1986	1987
Canada	19 289 706	20 487 779	20 883 241
Newfoundland	37 555	46 242	48 762
Prince Edward Island	180 596	188 508	213 413
Nova Scotia	241 738	266 600	290 590
New Brunswick	210 048	225 434	247 668
Quebec	2 880 579	3 225 273	3 246 079
Ontario	5 044 351	5 454 625	5 483 594
Manitoba	1 813 324	2 086 196	2 073 113
Saskatchewan	4 093 139	4 138 312	4 237 284
Alberta	3 845 764	3 792 520	3 970 685
British Columbia	942 612	1 064 069	1 072 053

[1] Includes supplementary payments

Source: Statistics Canada, Agriculture Economic Statistics

VALUE-ADDED IN THE FARM SECTOR BY PROVINCE, 1984

	Value-added ($ mil., 1984) 1981 constant dollars
Canada	10 180.8
Newfoundland	18.6
Prince Edward Island	147.9
Nova Scotia	126.4
New Brunswick	123.7
Quebec	1 536.9
Ontario	2 741.4
Manitoba	985.7
Saskatchewan	2 138.9
Alberta	1 828.0
British Columbia	533.0

Source: Statistics Canada

AVERAGE FARM, BY PROVINCE, 1986

	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Sales ($'000)	70.97	69.85	63.36	62.66	73.08	75.80	74.45	62.09	77.43	55.55	70.92
Size (hectares)	56.2	96.2	97.2	115.1	87.8	77.7	283.2	419.3	357.5	126.5	231.4
Capital value[1] ($'000)	163.1	260.7	225.7	214.0	227.9	326.4	349.5	461.2	495.4	340.3	374.2
Farms[2]	651	2 833	4 283	3 554	41 448	72 713	27 336	63 431	57 777	19 063	293 089

[1] Capital value includes land, buildings, machinery and livestock.
[2] All census farms (including those with sales under $2500)

Source: Statistics Canada, 1986 Census of Agriculture

PROVINCIAL PROFILES

NEWFOUNDLAND

Total farm cash receipts, 1987: $48 762 000
Share of cash receipts by commodity:

45% Poultry and eggs	5% Floriculture and nursery
75% Dairy[1]	2% Cattle and calves
8% Hogs	3% Other commodities
9% Fruits and vegetables (incl. potatoes)	3% Other payments[2]

Agriculture is an important contributor to local income and employment. Expansion is inhibited by a shortage of developed arable land.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

PRINCE EDWARD ISLAND

Total farm cash receipts, 1987: $213 413 000
Share of farm cash receipts by commodity:

38% Potatoes	6% Tobacco
17% Dairy[1]	3% Fruits and vegetables
14% Cattle and calves	7% Other commodities
12% Hogs	3% Other payments[2]

Agriculture is the leading industry in P.E.I. However, variable prices have a destabilizing effect on total farm receipts. Of the major commodities, only dairy products and potatoes are processed on the island.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

NOVA SCOTIA

Total farm cash receipts, 1987: $290 590 000
Share of cash receipts by commodity:

- 29% Dairy[1]
- 18% Poultry and eggs
- 11% Fruits and vegetables
- 12% Hogs
- 11% Cattle and calves
- 4% Floriculture and nursery
- 14% Other commodities
- 1% Other payments[2]

Nova Scotia's agricultural industry is very stable due to its diverse nature and the significant contribution made by the supply managed commodities – dairy, poultry and eggs. Future growth opportunities appear to be in horticulture, particularly vegetables, and livestock feed.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

NEW BRUNSWICK

Total farm cash receipts, 1987: $247 668 000
Share of cash receipts by commodity:

- 24% Dairy[1]
- 22% Potatoes
- 15% Poultry and eggs
- 8% Hogs
- 10% Cattle and calves
- 7% Fruits and vegetables
- 12% Other commodities
- 2% Other payments[2]

More than one-third of all commercial farms are involved in dairy production. Potatoes and livestock are produced in the Saint John River Valley. There is mixed farming throughout the rest of the province. Growth opportunities exist in the horticulture, feed grain and forage sectors. Successful development in the livestock feed sector should lead to increased red meat production.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

QUEBEC

Total farm cash receipts, 1987: $3 246 079 000
Share of cash receipts by commodity:

- 36% Dairy[1]
- 20% Hogs
- 11% Poultry and eggs
- 10% Cattle and calves
- 3% Corn
- 15% Other commodities
- 5% Other payments[2]

Quebec is the leader in Canadian milk production (39% of total milk production). Well over half the commercial farms are dairy farms supplying large butter and cheese industries. Livestock farms specializing in hogs, beef cattle, poultry and egg production and mixed farms are common. Forage crops are the largest cultivated crop. Oats and corn are produced for feed. Fruit and vegetable production is increasing. Some tobacco is also grown. Maple syrup is a major sideline for many farmers.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

ONTARIO

Total farm cash receipts, 1987: $5 483 594 000
Share of cash receipts by commodity:

- 20% Cattle and calves
- 20% Dairy[1]
- 12% Hogs
- 10% Poultry and eggs
- 10% Fruits and vegetables (incl. potatoes)
- 6% Corn
- 4% Floriculture and nursery
- 14% Other commodities
- 4% Other payments[2]

Ontario has the largest and most diversified agriculture sector in Canada. It has the largest number of commercial livestock farms and is the second largest dairy province. Livestock and livestock products account for 61% of farm cash receipts and crops contribute 33%. Major crops by value are grain corn, tobacco, soybeans and wheat.

Nationally, the provincial food and beverage manufacturing industry contributes 40% of industry sales and 45% of value-added.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

MANITOBA

Total farm cash receipts, 1987: $2 073 113 000
Share of cash receipts by commodity:

19% Wheat	3% Flaxseed
16% Cattle and calves	6% Dairy[1]
12% Hogs	14% Other comodities
3% Barley	22% Other payments[2]
5% Canola/rapeseed	

Wheat and barley predominate. Canola, flax and special crops are grown extensively. There is considerable mixed farming with emphasis on beef cattle. Vegetables, sugar beets and sunflowers are grown and processed in the province. Dairy farms are common near Winnipeg. Hog and beef production are widespread.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

SASKATCHEWAN

Total farm cash receipts, 1987: $4 237 284 000
Share of cash receipts by commodity:

36% Wheat	3% Hogs
13% Cattle and calves	2% Dairy[1]
7% Canola/rapeseed	5% Other commodities
4% Barley	30% Other payments[2]

Grain dominates Saskatchewan's agriculture sector. The province accounts for 52% of Canada's grain exports. It has 44% of Canada's cultivated land and accounted for 20% of Canada's farm cash receipts in 1987. Agriculture is a major sector within the province's economy with primary agriculture accounting for 18.5% of the provincial gross domestic product in 1984.

Relative to other provinces, Saskatchewan has very little value-added processing activity.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

ALBERTA

Total farm cash receipts, 1987: $3 970 685 000
Share of cash receipts by commodity group:

- 31% Cattle and calves
- 14% Wheat
- 8% Canola/rapeseed
- 6% Barley
- 7% Hogs
- 6% Dairy[1]
- 3% Poultry and eggs
- 5% Other commodities
- 20% Other payments[2]

Alberta's agriculture is diverse, ranging from dryland farming in the Palliser Triangle to irrigation farming in the south, ranching in the foothills and prairies, mixed farming in the parkland, and grain and oilseed production in the Peace River district.

Alberta is a major producer of slaughter cattle, wheat, barley and canola. It is also an important producer of hogs, poultry and eggs, milk and tame hay.

The province is also a major producer of minor commodities including sheep, oats, rye, mustard seed, forage seeds, honey, sugar beets and dehydrated alfalfa.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

BRITISH COLUMBIA

Total farm cash receipts, 1987: $1 072 053 000
Share of cash receipts by commodity:

- 23% Dairy[1]
- 16% Poultry and eggs
- 18% Fruits and vegetables
- 17% Cattle and calves
- 7% Floriculture and nursery
- 5% Hogs
- 11% Other commodities
- 3% Other payments[2]

Ten percent of B.C.'s land is agricultural. Most farms are concentrated in the river valleys, the south-central mainland and southern Vancouver Island. Dairy and poultry and egg production are concentrated in the lower Fraser Valley. Beef farming predominates in most other areas of the province. Beef calves are mainly finished in the prairies. Tree fruits and grapes are major commodities in the Okanagan region. The province is a major producer of apples and berry crops (e.g., raspberries). Horticultural crops are grown in the Fraser Valley and on Vancouver Island. The food processing industry in the province is well developed.

---

[1] Includes subsidy payments
[2] Other payments include crop insurance and federal and provincial stabilization payments including WGSA where applicable.

TYPE OF LAND TENURE

Canadian agriculture consists largely of family farms with individual ownership and control.

TYPE OF LAND TENURE IN CANADA (%)

	1971	1976	1981	1986
Sole proprietorship	92	92	87	82
Partnership	6	4	9	12
Corporation and other	2	4	4	6

Source: Statistics Canada, Census of Agriculture

FARM INCOME

FARM INCOME – CANADA ($'000)

	Average 1981-85	1986	1987
Total crop receipts	9 253 286	9 302 845	8 810 035
Total livestock receipts	9 345 543	10 144 088	10 464 514
Other cash receipts[a]	690 877	1 040 846	1 608 692
Total cash receipts	19 289 706	20 487 779	20 883 241
Income-in-kind	264 133	252 146	245 057
Realized gross income	19 553 839	20 739 925	21 128 298
Operating expenses	13 113 484	13 179 081	13 062 793
Depreciation charges	2 684 361	2 620 176	2 546 604
Total operating expenses and depreciation charges	15 797 845	15 799 257	15 609 397
Realized net farm income	3 755 994	4 940 668	5 518 901
Value of inventory change	– 63 160	617 737	–93 499
Total net income	3 692 834	5 558 405	5 425 402

[a] Includes receipts from sales of forest and maple products, provincial income stabilization payments, supplementary payments, dairy supplementary payments, and deficiency payments.

Source: Agriculture Economic Statistics, Statistics Canada

FARM INCOME – EASTERN CANADA ($'000)

	Average 1981-85	1986	1987
Total crop receipts	2 453 137	2 676 726	2 588 640
Total livestock receipts	5 676 119	6 206 407	6 268 208
Other cash receipts[a]	465 611	523 549	673 258
Total cash receipts	8 594 867	9 406 682	9 530 106
Income-in-kind	144 726	137 759	132 531
Realized gross income	8 739 593	9 544 441	9 662 637
Operating expenses	6 021 307	6 026 843	5 903 286
Depreciation charges	945 347	922 898	920 955
Total operating expenses and depreciation charges	6 966 654	6 949 741	6 824 241
Realized net farm income	1 772 939	2 594 700	2 838 396
Value of inventory change	30 277	-378 196	-1 284
Total net income	1 803 216	2 216 504	2 837 112

[a] Includes receipts from sales of forest and maple products, provincial income stabilization payments, supplementary payments, dairy supplementary payments, and deficiency payments.

Source: Agriculture Economic Statistics, Statistics Canada

FARM INCOME – WESTERN CANADA ($'000)

	Average 1981-85	1986	1987
Total crop receipts	6 800 149	6 626 119	6 221 395
Total livestock receipts	3 669 424	3 937 681	4 196 306
Other cash receiptsa	225 266	517 297	935 434
Total cash receipts	10 694 839	11 081 097	11 353 135
Income in kind	119 407	114 387	112 526
Realized gross income	10 814 246	11 195 484	11 465 661
Operating expenses	7 092 177	7 152 238	7 159 507
Depreciation charges	1 739 014	1 697 278	1 625 649
Total operating expenses and depreciation charges	8 831 191	8 849 516	8 785 156
Realized net farm income	1 983 055	2 345 968	2 680 505
Value of inventory change	- 93 436	995 933	-92 215
Total net income	1 889 619	3 341 901	2 588 290

[a] Includes receipts from sales of forest and maple products, provincial income stabilization payments, supplementary payments, dairy supplementary payments, and deficiency payments.

Source: Agriculture Economic Statistics, Statistics Canada

COMMODITY PROFILES

FARM CASH RECEIPTS BY MAJOR COMMODITY, 1980-87 ($ mil.)

	Grains and oilseeds[1]	Other crops[2]	Cattle and calves	Hogs	Dairy products and subsidies	Poultry and eggs
1987	4201	2888	3757	2120	3154	1474
1986	4736	2905	3584	2125	3089	1431
1985	5156	2715	3585	1824	3000	1410
1984	6324	2842	3544	1873	2977	1401
1983	6442	2517	3411	1713	2709	1250
1982	5988	2386	3454	1954	2831	1236
1981	6372	2621	3440	1618	2597	1256
1980	4988	2116	3648	1404	2271	1077

[1] Wheat, barley, oats, flaxseed, canola, soybeans, rye, CWB payments
[2] Corn, potatoes, fruit, vegetables, floriculture, tobacco, sugar beets and other crops

Source: Agriculture Economic Statistics, Statistics Canada

GRAINS AND OILSEEDS

The sector includes:	Wheat	Spring, winter, durum
	Coarse grains	Barley, corn, oats, rye and mixed grains
	Oilseeds	Canola (rapeseed), flaxseed and soybeans

Canada is:

- the sixth largest wheat producer
- the second largest wheat exporter (behind USA)
- the third largest producer of canola (rapeseed) (behind People's Republic of China and EEC)
- the leading exporter of canola seed

Grain and oilseed production (1987/88)

57.1 million tonnes*
Previous 5-year average: 53.2 million tonnes

*National Grains Bureau – Bi-Weekly Update – July 20, 1988

Number of farms (1987) (with sales of $2500 or more)**

105 452 (primarily in Western Canada) who derive a majority of sales from grains and oilseeds

Farm cash receipts (1987)

$6.0 billion, or 28.6% of total farm cash receipts*
Previous 5-year average: $6.7 billion

Grains and oilseeds trade, 1987

$4.3 billion in exports
Previous 3-year average $5.95 billion

* Statistics Canada Agriculture Economic Statistics
**Census Data.

MAJOR MARKETS, 1986-87

	Exports (mil. t)	Percent of total grains and oilseeds exports
USSR	6.5	25.5
Japan	3.8	15.0
China	2.5	9.9
EEC	2.4	9.3
Cuba	1.2	4.7
U.S.	1.4	0.63
Other	8.4	33.1

Note: Totals may not add due to rounding.

Source: Canada's Trade in Agricultural Products 1984, 1985 and 1986

MARKETING SYSTEM

The Canadian Wheat Board is the sole marketing agency for wheat, oats and barley grown in the Prairie Provinces, whether destined for export or domestic human consumption.

All Ontario wheat is marketed by the Ontario Wheat Producers Marketing Board.

Other grains and oilseeds produced in Canada – notably canola, corn, feed wheat, oats and barley – are sold through the open market into the commercial handling system.

FARM CASH RECEIPTS BY COMMODITY, 1987 ($ mil.)

Commodity	Farm cash receipts	Percent of total farm cash receipts
Wheat	2 562.3 (3 675.0[1])	12.3
Coarse grains (oats, barley, rye, corn)	979.8 (1 431.4[1])	4.7
Oilseeds	1 062.9 (1 153.3[1])	5.1
Other[2]	1 361.3 (505.5[1])	6.5
Total grains and oilseeds	5 966.3 (6 763.1[1])	28.6

[1] Average for previous 5 years
[2] Includes Western Grain Stabilization payments, Canadian Wheat Board net cash advances, deferred grain receipts, liquidation of deferred grain receipts, CWB repayments.

Source: Statistics Canada, Agriculture Economic Statistics

AREA 1987 ('000 hectares)

	All Wheat	Coarse grains	Oilseeds	Total
WESTERN CANADA	13 239.7 (13 189.4[1])	6 408.7 (6 466.7[1])	3 269.8 (3 141.7[1])	22 918.2 (22 797.8[1])
EASTERN CANADA (primarily Ontario followed by Quebec)	267.8 (268.3[1])	2 000.1 (2 134.3[1])	475.7 (409.5[1])	2 743.6 (2 812.1[1])
CANADA	13 507.5 (13 464.8[1])	8 553.2 (8 911.4[1])	3 779.9 (3 246.9[1])	25 840.6 (25 623.1[1])

[1] Average for previous 5 years

Note: Totals may not add owing to rounding.

Source: Statistics Canada, Field Crop Reporting, Crop Section, Agricultural Resources Division
Preliminary estimates of principal field crop area June 29, 1988

FARM CASH RECEIPTS FROM GRAINS AND OILSEEDS, BY PROVINCE AND REGION , 1987 ($ mil.)

	Total	Grains and oilseeds	Percent of total		Total	Grains and oilseeds	Percent of total
Newfoundland	48.8	–	0.0	Manitoba	2 073.1	1 048.8	50.6
Prince Edward Island	213.4	3.2	1.5	Saskatchewan	4 237.3	2 898.2	68.4
Nova Scotia	290.6	1.1	0.4	Alberta	3 970.7	1 731.1	43.6
New Brunswick	247.7	2.3	0.9	British Columbia	1 072.1	33.9	3.2
Quebec	3 246.1	138.5	4.3				
Ontario	5 483.6	640.2	11.7	Western Canada	11 353.2	5 712.0	50.3
Eastern Canada	9 530.2	785.3	8.2	Canada	20 883.2	6 497.3	31.1

Source: Statistics Canada, Agriculture Economic Statistics

PRODUCTION, 1987 ('000 t)

	Wheat	Coarse grains	Oilseeds	Total
Western Canada	25 481.5 (25 131[1])	15 901.5 (14 273.2[1])	4 609.6 (3 855.8[1])	45 992.6 (43 260[1])
Eastern Canada	860.6 (1 062.6[1])	9 628.8 (9 614.1[1])	1 296.5 (938.9[1])	11 809.8 (11 615.6[1])
Canada	26 342.1 (26 135.9[1])	25 964.6 (24 440.1[1])	5 958 (4 374.7[1])	57 477.1 (54 950.7[1])

[1] Average for previous 5 years

Note: Totals may not add owing to rounding.

Source: Statistics Canada, Field Crop Reporting, Crop Section, Agricultural Resources Division
November Estimate of Production of Principal Field Crops November 27, 1987.

STABILIZATION PROGRAMS

The Western Grain Stabilization Program, introduced in 1976, covers wheat, barley, oats, rye, flaxseed, canola and domestic mustard seed, as well as, under amendments to the Act made in 1988, (triticale, mixed grain, sunflower seed, safflower seed, buckwheat, peas, lentils, fababeans and canaryseed) grown in the Canadian Wheat Board designated area. The voluntary program operates under a joint federal government/producer premium scheme.

Stabilization payments are also issued to grains and oilseeds producers by the federal Agricultural Stabilization Board, under the terms of the Agricultural Stabilization Act (ASA). Support prices for corn, soybeans, wheat (winter and spring), oats and barley grown outside the Canadian Wheat Board area, as well as for other designated agricultural commodities, are established by the board.

MAJOR ORGANIZATIONS

Canadian Wheat Board
Contact: W.E. (Esmond) Jarvis
Chief Commissioner
423 Main St.,
Winnipeg, Man. R3C 2P5
Tel: (204) 983-3416 or (204) 949-3411

Ontario Wheat Producers' Marketing Board
Contact: L.R. (Ross) Addeman
General Manager
P.O. Box 668, 880 Richmond St.
Chatham, Ont. N7M 5K8
Tel.: (519) 354-4430

Saskatchewan Wheat Pool
Contact: G. (Garf) Stevenson
President
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Regina, Sask. S4T 7T9
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Alberta Wheat Pool
Contact: D.E. (Doug) Livingstone
President
505 - 2 St. S.W.
Calgary, Alta. T2P 2P5
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Manitoba Pool Elevators
Contact: W.J. (Bill) Strath
President
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Tel.: (204) 947-1171

United Grain Growers
Contact: Lorne Hehn
President
433 Main St.
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Winnipeg, Man. R3C 3A7
Tel.: (204) 944-5411

Canada Grains Council
Contact: Dr. D. (Don) Dever
President
760 - 360 Main St.
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Tel.: (204) 942-2254

Canola Council of Canada
Contact: Dr. A.E. (Allen) Earl
President
301-433 Main Street
Winnipeg, Man. R3B 1B3
Tel.: (204) 944-9494

Canadian Grain Commission
Contact: Richard Klaffen
Assistant Chief Commissioner
600 - 303 Main St.
Winnipeg, Man. R3C 3G8
Tel.: (204) 983-2732

Winnipeg Commodity Exchange
Contact: P.K. (Peter Huffman)
Executive Vice-President
500 - 360 Main St.
Winnipeg, Man. R3C 3Z4
Tel.: (204) 949-0495

RED MEATS

The sector includes beef cattle, swine, sheep, semen, embryos and miscellaneous livestock products.

Red meat producers use about 50% of all cereal grains produced in Canada.

Red meat processing is Canada's fourth largest manufacturing industry, with sales of over $8 billion in 1985. It is the largest sector in the food industry.

National herd (1987)	Cattle and calves	11 745 900	Sheep and lambs	700 900
	Pigs	10 493 000		
Number of farms (1986)	Beef cattle	59 262	Sheep	10 939
	Swine	12 026	Total	82 227
Major markets	Beef	Domestic	Pork	Domestic (70% of sales)
	Lamb	Domestic		
Farm cash receipts (1987)	$5.9 billion 28.1% of total farm cash receipts			

FARM CASH RECEIPTS FROM RED MEAT, 1987

Commodity	Farm cash receipts	Percent of total farm cash receipts
Cattle/calves	$3.8 billion	18.0
Hogs	$2.1 billion	10.2
Sheep/lambs	$33.5 million	0.2

FARM CASH RECEIPTS FROM RED MEAT, BY PROVINCE, 1987

	Farm cash receipts ($ mil.)	Percent of provincial farm cash receipts
Ontario	1 764.9	32.2
Alberta	1 505.0	37.9
Quebec	969.1	29.8
Saskatchewan	682.8	16.1
Manitoba	577.2	27.8
British Columbia	237.4	22.1
Nova Scotia	68.3	23.5
Prince Edward Island	56.0	26.3
New Brunswick	44.6	18.0
Newfoundland	5.2	10.7
Canada	5 910.5	28.3

Source: Statistics Canada, Agriculture Economic Statistics

Beef

National herd (million head)

Total	11.7			
Beef cows	3.2	Calves	3.6	
Heifers and steers	2.6	Other	2.3	

Number of farms (1986): 59 262 (with sales of $2500 or more)

Major breeds

British		Exotic	
Hereford	Shorthorn	Charolais	Limousin
Angus		Simmental	Maine-Anjou

Distribution of production	Beef cows	Beef slaughter
West	81.5%	61.0%
East	18.5%	39.0%

The feedlot sector is located primarily in Ontario and Alberta. About 500 000 feeder cattle are moved annually from the western provinces to Ontario for finishing.

Farm cash receipts (1987) $3.8 billion, or about18.0% of total farm cash receipts

FARM CASH RECEIPTS BY PROVINCE, 1987

	Farm cash receipts ($ mil.)	Percent of provincial farm cash receipts
Alberta	1 213.4	30.6
Ontario	1 071.4	19.5
Saskatchewan	565.7	13.4
Manitoba	322.6	15.6
Quebec	311.2	9.6
British Columbia	186.0	17.3
Nova Scotia	32.8	11.3
Prince Edward Island	29.3	13.7
New Brunswick	23.7	9.6
Newfoundland	1.2	2.5
Canada	3 757.3	18.0

Source: Statistics Canada, Agriculture Economic Statistics

DOMESTIC MARKETING SYSTEM

Marketing systems differ markedly between regions. In Saskatchewan and Manitoba, virtually all slaughter steers and heifers are sold through central-desk selling agencies; in the remaining provinces, slaughter cattle are sold directly from the feedlot to packing plants, either through tender bidding, direct buying or electronic and stockyards auctioning.

Canadian Meat Council
Contact: Dave Adams
General Manager
5233 Dundas Street West
Toronto, Ont.
M9B 1A6
Tel: (416) 239-8411

CANADA'S TRADE IN DRESSED BEEF AND VEAL, AND OFFALS

	1984	1985	1986	1987
Exports				
Dressed				
Volume (kt)	79	92	83	73
Value ($ mil.)	193	222	202	201
Beef offals				
Volume (kt)	18	18	20	14
Value ($ mil.)	18	20	20	19
Total value ($ mil.)	211	241	222	220
Imports				
Dressed				
Volume (kt)	78	76	76	92
Value ($ mil.)	280	258	263	332

Source: Statistics Canada, External Trade Division

Major market: United States (beef), EEC (offals)
Major competitors: United States
Major suppliers: United States, Australia, New Zealand

CANADA'S TRADE IN BEEF BREEDING STOCK

	1984	1985	1986	1987		1984	1985	1986	1987
Exports					**Imports**				
Purebred beef cattle					Cattle, excluding dairy				
Volume ('000 head)	8.0	6.3	3.7	4.3	Volume ('000 t)	18.4	28.2	29.4	41.9
Value ($ mil.)	16.4	12.3	6.8	7.8	Value ($ mil.)	34.7	49.8	53.0	82.9
Animal semen									
Value ($ mil.)	14.3	14.7	16.0	25.6					

Sources: Statistics Canada and Agriculture Canada, Trade Tapes

Major markets: United States, Mexico, EEC
Major competitors: United States
Major supplier: United States

NATIONAL TRIPARTITE BEEF STABILIZATION PROGRAM

The voluntary National Tripartite Stabilization program, which includes plans for slaughter cattle and feeder calves (cow-calf), was introduced in 1986. A plan for backgrounders (partly finished cattle) was also included as of July 1, 1987

The program is funded by equal premiums from the federal government, participating provincial governments and participating producers.

Participants as of July 1988, are Alberta, Ontario and Prince Edward Island.

PROVINCIAL BEEF STABILIZATION PROGRAMS

Quebec	back feeder cattle, cow-calf	Saskatchewan	cow-calf to finish, feeder to finish
Manitoba	cow-calf to finish (no feedlot coverage)	British Columbia	calf, yearling, finishing

There are no active beef stabilization programs in Newfoundland, Nova Scotia or New Brunswick.

MAJOR PRODUCER ORGANIZATION

The Canadian Cattlemen's Association
Contact: Charles Gracey
Executive Vice-President
590 Keele St., Rm. 3422
Toronto, Ont. M6M 3E3
Tel: (416) 766-6871 or
(416) 766-2787

Pork

National herd	10.5 million	
Number of farms (1986)	12 026 (with sales of $2500 or more)	
Major breeds:	Yorkshire Landrace	Duroc Hampshire
Farm cash receipts (1987)	$2.1 billion, or 10.2% of total farm cash receipts	

FARM CASH RECEIPTS BY PROVINCE, 1987

	Farm cash receipts ($ mil.)	Percent of provincial farm cash receipts
Ontario	682.4	12.4
Quebec	651.7	20.1
Alberta	284.1	7.2
Manitoba	252.8	12.2
Saskatchewan	115.0	2.7
British Columbia	49.1	4.6
Nova Scotia	33.8	11.6
Prince Edward Island	26.5	12.4
New Brunswick	20.4	8.2
Newfoundland	3.8	7.9
Canada	2119.7	10.2

Source: Statistics Canada, Agriculture Economic Statistics

DOMESTIC MARKETING SYSTEM

Hogs are marketed through eight provincial marketing boards. None of these boards has supply management powers. Newfoundland and Quebec are the exceptions, the former because of the small number of hogs marketed and the latter as a result of vertical integration in the industry.

CANADA'S PORK TRADE

	1984	1985	1986	1987
Exports				
Dressed				
Volume (kt)	173	194	213	235
Value ($ mil.)	445	490	657	716
Offals				
Volume (kt)	55	57	60	53
Value ($ mil.)	41	40	43	41
Sausages				
Volume (kt)	3	2	2	2
Value ($ mil.)	12	12	11	12
Total value ($ mil.)	499	542	711	769
Imports				
Dressed				
Volume (kt)	12	15	12	16
Value ($ mil.)	36	41	42	56

Source: Statistics Canada

Major markets: United States, Japan, EEC
Major competitors: EEC, Taiwan, United States
Major supplier: United States

CANADA'S TRADE IN LIVE SWINE

	1984		1985		1986		1987	
	'000 head	$'000	'000 head	$'000	'000 head	$'000	'000 head	$'000
Exports								
Total	1 346	202 213	1 152	160 680	502	83 479	427	66 097
To U.S.	1 345	201 638	1 150	160 022	500	82 827	425	64 894
Imports[1]								
Total	19	131	32	255	82	525	59	474

[1]Volume expressed in '000 kg

Source: Statistics Canada

NATIONAL TRIPARTITE HOG STABILIZATION PROGRAM

The voluntary National Tripartite Stabilization program, which includes a plan for hogs, was introduced in 1986. The plan is funded by equal premiums from the federal government, provincial governments and participating producers.

Participants, as of July 1988, are Alberta, Saskatchewan, Manitoba and Ontario.

PROVINCIAL HOG STABILIZATION PROGRAMS

Newfoundland (interim), Prince Edward Island, Nova Scotia, New Brunswick, Quebec, British Columbia

MAJOR ORGANIZATION

Canadian Pork Council
Contact: Martin Rice
Executive Secretary
75 Albert St., Suite 1101
Ottawa, Ont.
K1P 5E7
Tel: (613) 236-3633

Sheep and lambs

National flock	700 900
Number of farms (1986)	10 939
Major breeds	Suffolk Dorset Hampshire Rambouillet
Farm cash receipts (1985)	$33.5 million, or 0.2% of total farm cash receipts

FARM CASH RECEIPTS BY PROVINCE, 1987

	Farm cash receipts ($ mil.)	Percent of provincial farm cash receipts
Ontario	11.1	0.2
Alberta	7.4	0.2
Quebec	6.2	0.2
British Columbia	2.3	0.2
Saskatchewan	2.1	0.1
Manitoba	1.9	0.1
Nova Scotia	1.7	0.6
New Brunswick	0.5	0.2
Prince Edward Island	0.2	0.1
Newfoundland	0.2	0.4
Canada	33.5	0.2

Source: Statistics Canada, Agriculture Economic Statistics

DOMESTIC MARKETING SYSTEM

A large proportion of sheep produced in Canada are sold at the farm gate. Lambs are also marketed through stockyards, direct to packers, marketing agency and commissions. Alberta has the only federal inspected packing plant that specializes solely in the slaughter and processing of lamb.

CANADA'S TRADE IN MUTTON AND LAMB

	1984	1985	1986	1987		1984	1985	1986	1987
Exports					**Imports**				
Mutton/lamb		negligible			Mutton/lamb				
					Volume (t)	9 018	10 961	15 145	13 967
					Value ($'000)	21 936	28 330	41 995	40 268

Source: Statistics Canada

Major suppliers: New Zealand, Australia, United States

CANADA'S LIVE TRADE IN SHEEP AND LAMBS

	1984	1985	1986	1987		1984	1985	1986	1987
Exports					**Imports**				
Volume (head)	15 138	19 154	22 458	24 791	Volume (head)	53 307	38 413	36 979	34 227
Value ($'000)	1 265	1 829	2 235	2 789	Value ($'000)	3 807	3 274	3 495	3 137

Source: Statistics Canada

Major market: United States
Major competitor: United States
Major suppliers: United States, New Zealand

NATIONAL TRIPARTITE LAMB STABILIZATION PROGRAM

The voluntary National Tripartite Stabilization program, which includes a plan for lambs, was introduced in 1986. The program is funded by equal premiums from the federal government, participating provincial governments and participating producers.

Participants, as of July 1988, are Prince Edward Island, Nova Scotia, Ontario, Saskatchewan and Alberta.

PROVINCIAL STABILIZATION PROGRAMS

Quebec, British Columbia and Manitoba

MAJOR ORGANIZATION

Canada Sheep Council
Contact: Tom Redpath
Chairman
10 Campbell Crescent
Willowdale, Ont. M2P 1P2
Tel: (416) 440-1068

POULTRY/EGGS

This sector includes chicken, turkey, eggs, hatching eggs, ducks and geese.

Production (1987)	Broilers	385.5 million
	Laying hens	22.6 million
	Turkeys	18.2 million
Major breeds	Meat chickens: "Shaver Starbro" Laying hens: "Shaver 288" Turkeys: Hybrid and Nicholas	
Number of registered producers	5 019	
Farm cash receipts (1987)	$1.5 billion, or 7.1% of total Canadian farm cash receipts	
	Hatching eggs	$103.0 million
	Eggs	$384.0 million
	Hens and chickens	$792.2 million
	Turkeys	$194.7 million

DISTRIBUTION OF PRODUCTION BY PROVINCE, 1987

	Percent of Canadian production[1]			Farm cash receipts ($ mil.)	
	Eggs[1]	Chicken[2]	Turkey[2]	Eggs	Poultry[3]
Ontario	41.0	35.9	43.5	182.9	355.7
Quebec	16.5	30.9	23.0	90.7	270.3
British Columbia	12.1	10.7	9.6	58.9	111.2
Alberta	8.5	8.4	8.6	43.9	93.9
Manitoba	9.8	3.9	7.6	47.7	50.5
Saskatchewan	3.4	2.5	3.8	17.2	34.1
Nova Scotia	4.1	3.6	2.5	20.0	33.3
New Brunswick	2.3	2.7	1.4	14.0	23.7
Newfoundland	1.6	1.3	–	8.7	13.0
Prince Edward Island	0.7	0.1	–	3.0	1.1
Canada	100.0	100.0	100.0	487.0	986.9

[1] Graded in registered stations
[2] Slaughtered in registered stations
[3] Chicken, turkeys and stewing hens

Sources: Statistics Canada, Agriculture Economic Statistics, Agriculture Canada

SUPPLY MANAGEMENT SYSTEM

Poultry and egg production in Canada operates within a supply management system controlled both provincially and nationally.

In the 1970s, provincial chicken, turkey and egg marketing boards federated to form three national marketing agencies: the Canadian Chicken Marketing Agency (CCMA), the Canadian Turkey Marketing Agency (CTMA) and the Canadian Egg Marketing Agency (CEMA). Each year, these agencies establish national ("global") production quotas, of which fixed percentages are allocated to each province based on historical production patterns. The Canadian Egg Marketing Agency also sets a support price for Grade A table eggs, and buys and markets egg surpluses.

Import controls for poultry and eggs are exercised through an import permit system administered by External Affairs Canada. National import quotas are established each year.

The national marketing agencies are overseen by the National Farm Products Marketing Council.

PRIMARY PROCESSING, FEDERALLY REGISTERED STATIONS, 1987

Operation	Number	Output
Egg hatcheries	127	444.8 million chicks 27.7 million turkey poults
Egg stations	315	Grade 27 million boxes of 15-dozen eggs (86.5% of total egg production)
Egg processing	13	Break, pasteurize and process 58 million dozen shell eggs
Poultry processing	132	676 million kilograms, eviscerated weight, all poultry types
Major market		Domestic

Source: Agriculture Canada

CANADA'S POULTRY AND EGG TRADE

	1984	1985	1986	1987		1984	1985	1986	1987
Exports					**Imports**				
Hatching eggs Value ($ mil.)	9.5	11.7	12.0	13.4	Hatching eggs Value ($ mil.)	14.4	16.8	19.4	21.9
Other eggs Value ($ mil.)	15.2	11.7	8.3	12.2	Live poultry Value ($ mil.)	25.1	24.5	28.7	31.2
Live poultry Value ($ mil.)	20.1	16.7	20.1	19.2	Poultry meat, fresh or frozen Value ($ mil.)	58.7	50.1	54.8	55.1
Total value ($ mil.)	49.4	45.7	47.0	55.9	Total value ($ mil.)	110.1	104.9	118.2	121.8

Source: Agriculture Canada, Canada's Trade in Agricultural Products, 1985, 1986 and 1987

Major market: United States
Major competitors: United States
Major supplier: United States

MAJOR ORGANIZATIONS

Canadian Poultry and Egg Processors' Council
Contact: D.G. McKenzie
Ex. Vice-President
1 Eva Rd., Suite 300
Etobicoke, Ont. M9C 4Z5
Tel: (416) 622-8621

Canadian Chicken Marketing Agency
Contact: Roger Cramm
General Manager
400 Dalhousie St.
Ottawa, Ont. K1N 9J9
Tel: (613) 594-2800

Canadian Egg Marketing Agency
Contact: General Manager
116 Albert St., Ste. 507
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Tel: (613) 238-2514

Canadian Turkey Marketing Agency
Contact: Kenneth E. Crawford
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Brampton, Ont. L6T 4B5
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Canadian Egg Producers' Council
Contact: Peter Martin
Secretary
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Tel: (613) 236-3633

Canadian Broiler Hatching Egg Marketing Agency
Contact: Archie Levasseur
General Manager
200 Elgin Street, Ste. 750
Ottawa, Ontario K2P 1L5
Tel: (613) 232-3023

National Farm Products Marketing Council
Contact: R. Barrie
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13th Floor, Martel Bldg.
270 Albert St.
Ottawa, Ontario K1P 6L4
Tel: (613) 995-2297
OR
P.O. Box 3430, Station D
Ottawa, Ontario K1P 6L4

DAIRY

Dairy processing is the second most important sector of Canada's processing food industry (after meat).

National herd (1987)	Dairy cows 1.4 million Dairy heifers 670 000
Number of farms (1987)	34 186 (with sales of $2500 or more)
Major breed	Holstein Others: Guernsey, Ayrshire, Jersey
Farm cash receipts (1987)	$2.9 billion, or 13.8% of total farm cash receipts
Fluid and industrial milk production	About 74 million hectolitres per year
Milk shipment/cow/year (1987)	5 239 L

FARM CASH RECEIPTS BY PROVINCE, 1987

	Farm cash receipts ($ mil.)	Percent of provincial farm cash receipts
Quebec	1 045.1	32.2
Ontario	997.2	18.2
British Columbia	231.3	21.6
Alberta	221.1	5.6
Manitoba	110.2	5.3
Saskatchewan	89.4	2.1
Nova Scotia	80.9	27.8
New Brunswick	54.6	22.0
Prince Edward Island	31.9	14.9
Newfoundland	12.1	24.9
Canada	2 873.8	13.8

Source: Statistics Canada, Agriculture Economic Statistics

SUPPLY MANAGEMENT SYSTEM

Since 1974, milk production has been carried out within supply management policies operating at both the national and provincial levels.

Through the Canadian Dairy Commission, the federal government also pays a direct producer subsidy of $6.03/hL (containing 3.6 kg of butterfat) on industrial milk for domestic consumption.

Under the Special Export Program, the same subsidy is provided on up to 1.1 million hectolitres of industrial milk produced for export. Total direct subsidy payments for 1986-87 were $279.7 million.

In support of both federal and provincial programs, the federal government controls imports of many dairy products through the Import Control List.

SHARE OF MARKET-SHARING QUOTA (MSQ)[1] BY PROVINCE, 1987 (%)

Quebec	47.6
Ontario	31.1
Alberta	6.7
Manitoba	3.9
British Columbia	3.7
Saskatchewan	2.6
Prince Edward Island	1.9
New Brunswick	1.3
Nova Scotia	1.3
Newfoundland	0

[1] For industrial milk

Source: Canadian Dairy Commission

TRENDS IN PER-CAPITA DAIRY PRODUCT CONSUMPTION

	1984	1985	1986	1987	Trend
Butter (kg)	4.26	4.02	3.93	4.04	+
Cheddar cheese (kg)	3.90	4.07	4.25	4.33	+
Specialty cheese (kg)	4.38	4.73	5.32	5.48	+
Ice cream (L)	11.98	12.22	12.34	12.08	–
Yogurt (L)	2.12	2.41	2.74	3.42	+
Fresh milk (L)	102.6	101.4	102.2	104.0	+
Fresh cream (L)	4.53	4.73	4.97	5.20	+

Source: Statistics Canada

CANADA'S DAIRY PRODUCT TRADE

	1984	1985	1986	1987		1984	1985	1986	1987
Exports					Total dairy				
Evaporated milk					Value ($ mil.)	241.2	217.2	194.7	145.4
Volume (kt)	133	103	55	23					
Value ($ mil.)	118.7	93.4	51.5	24.1	**Imports**				
Skim milk powder					Cheese				
Volume (kt)	70	61	66	46	Volume (kt)	23	21	21	20
Value ($ mil.)	69.4	62.4	73.3	52.0	Value ($ mil.)	96.5	91.0	106.1	112.6
Cheese									
Volume (kt)	5	11	12	10	Total dairy				
Value ($ mil.)	23.4	34.3	36.8	37.6	Value ($ mil.)	112.9	108.7	129.0	143.0

Source: Agriculture Canada

Major markets: Skim milk powder – food aid through CIDA, Mexico, Peru
Evaporated milk – Algeria, Nigeria, Libya
Cheese – U.K., United States, Japan

Major suppliers: EEC, United States

CANADA'S TRADE IN DAIRY ANIMALS AND SEMEN ($ mil.)

	1984	1985	1986	1987
Exports				
Purebred dairy cattle	38.7	36.2	36.5	38.4
Purebred, other	16.4	12.3	6.8	7.8
Other cattle and calves	215.5	215.8	170.2	197.4
Semen[1]	14.6	14.8	16.1	25.8
Imports				
Cattle, dairy	1.7	0.8	38.4	7.5
Cattle, other	34.7	49.8	53.0	82.9

[1] Includes both beef and dairy cattle semen. However, dairy semen accounts for the largest part.

Source: Agriculture Canada

Major markets: United States, Mexico, Venezuela
Major competitor: United States
Major suppliers: United States, New Zealand

MAJOR NATIONAL ORGANIZATIONS

Dairy Farmers of Canada
Contact: Mr. Richard Doyle, Executive Secretary
75 Albert St., Suite 1101
Ottawa, Ont. K1P 5E7
Tel: (613) 236-9997

National Dairy Council
Contact: Mr. Kempton Matte, President
141 Laurier Ave. West, Suite 704
Ottawa, Ont. K1P 5J3
Tel: (613) 238-4116

Holstein Association of Canada
Contact: Mr. David H. Clemons
Secretary and Chief Executive
P.O. Box 610
Brantford, Ont. N3T 5R4
OR
61 George St.
Brantford, Ont. N3T 2Y2
Tel: (519) 756-8300

SEMEX Canada
Contact: Dr. M.G. Freeman
General Manager
130 Stone Road West
Guelph, Ont. N1G 3Z2

Ayrshire Breeders Association of Canada
Contact: Alain Trudeau
Secretary Manager
1160 Carling Avenue
Ottawa, Ont.
K1Z 7K6
Tel: (613) 728-8192

Canadian Jersey Association
Contact: Russell Gammon
Secretary Manager
343 Waterloo Avenue
Guelph, Ont.
N1H 3K1
Tel: (519) 821-1130

Canadian Guernsey Association
Contact: Elizabeth Barnes
Secretary Manager
368 Woolwich Street
Guelph, Ont.
N1H 3W6
Tel: (519) 836-2141

Canadian Brown Swiss Association
Contact: Fred Abraham
Secretary Treasurer
343 Waterloo Avenue
Guelph, Ont.
N1H 3K1
Tel: (519) 821-2811

Canadian Livestock Exporters Association
Contact: Debbie Goodfellow
Export Coordinator
P.O. Box 342
Brantford, Ontario
N3T 5N3
Tel: (519) 756-8300

HORTICULTURE

The sector includes fresh and processed vegetables, potatoes and seed potatoes, berry crops, tree fruits, protected crops (i.e., greenhouse vegetables, flowers and plants), mushrooms and nursery crops.

Horticultural products make up 43% of the average Canadian diet.

Number of farms (1986)	35 433
Farm size	Greenhouse: 0.5-6.0 ha Fruits and vegetables: 20-200 ha
Farm cash receipts (1987)	$1.8 billion, or 8.4% of total farm cash receipts

HORTICULTURAL FARM CASH RECEIPTS BY PROVINCE ($ mil.)

	1986	1987	Percent of provincial farm cash receipts 1987
Ontario	723.1	779.4	14.2
British Columbia	274.0	286.1	26.7
Quebec	247.5	287.1	8.8
Alberta	85.0	93.4	2.4
New Brunswick	65.2	77.5	31.3
Prince Edward Island	65.0	89.1	41.7
Manitoba	60.2	72.4	3.5
Nova Scotia	46.2	50.7	17.4
Saskatchewan	11.3	12.3	0.3
Newfoundland	6.2	6.5	13.3
Canada	1 583.7	1 754.5	8.4

Source: Statistics Canada, Agriculture Economic Statistics

FARM GATE VALUE OF PRODUCTION, 1986 ($ 000)

	Atlantic	Quebec	Ontario	Prairie	B.C.	CANADA
Fresh field vegetables[a]	14 202	84 104	211 427	16 722	29 010	385 647[bc]
Potatoes[a]	173 341	51 068	50 700	67 230	15 394	357 733
Processing vegetables[ad]	f	11 303	85 051	f	1 027	121 212[be]
Berries and grapes[a]	19 419	15 023	53 141	f	65 461	153 044
Other tree fruit[a]	631	f	31 588	f	11 529	43 626
Apples[a]	12 124	15 571	49 709	f	35 111	114 515
Protected vegetables	1 869[d]	4 213	35 129	f	9 833	55 237
Ornamentals and plants	24 238	33 625	165 312	25 873	49 457	298 506

(continued)

FARM GATE VALUE OF PRODUCTION, 1986 ($ 000) (Concluded)

	Atlantic	Quebec	Ontario	Prairie	B.C.	CANADA
Nursery and sod	6 374	34 707	114 441	20 146	41 181	216 850
Mushrooms (Maritimes and Quebec)	8 017		69 866	20 041	36 767	136 281
Honey	675	7 238	7 937	29 548	4 230	49 628
Maple products	1 221	58 094	3 794	g	g	63 109

[a] Crop year
[b] Discrepancy in total due to confidential data
[c] Includes processing vegetables
[d] Some data not released by province or region and so some numbers understate amount from the area
[e] Farm gate contracted and harvested, excluding potatoes
[f] Not reported for this area
[g] Not produced in this area

Source: Statistics Canada, cat. nos. 22-202, 22-203, 22-204 and 23-210

AREA UNDER PRODUCTION, 1986[a] (hectares)

	Atlantic	Quebec	Ontario	Prairie	B.C.	CANADA
Field vegetables	2 940	26 345	59 963	2 818	5 818	99 852[bc]
Potatoes	47 470	17 280	19 140	29 485	3 182	111 567
Processing vegetables	[d]	8 913	30 136	[d]	199	51 208[be]
Berries and grapes	14 191	6 104	12 775	662	6 734	40 470
Tree fruits	5 245	9 015	21 258	75	11 249	46 846
Greenhouse vegetables[f]	–	–	–	–	–	129
Greenhouse flowers[f]	–	–	–	–	–	280
Total greenhouse[g]	28.8	67.3	295	34.2	67.6	493

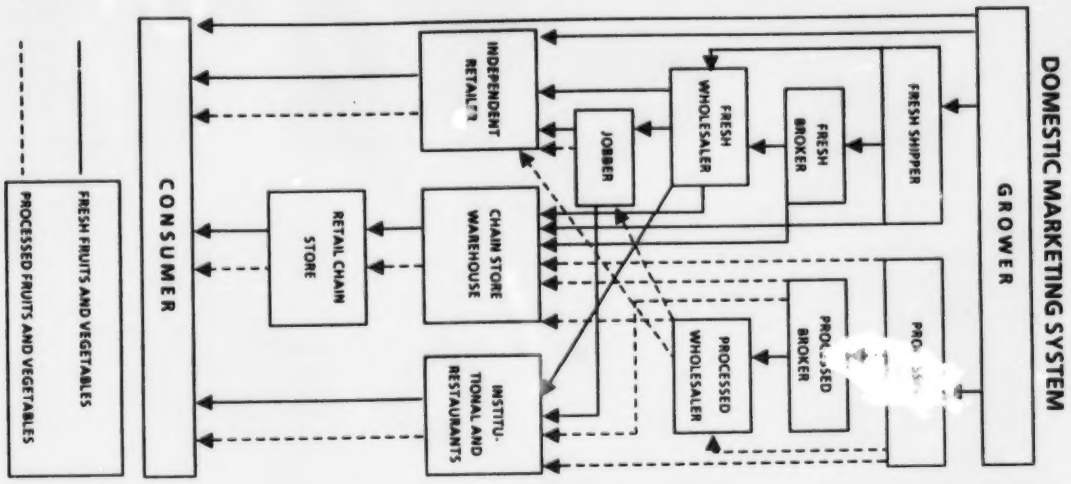
(continued)

AREA UNDER PRODUCTION, 1986[a] (hectares) (concluded)

	Atlantic	Quebec	Ontario	Prairie	B.C.	CANADA
Nursery and sod	1 444	6 783	15 439	5 404	1 478	30 548
Mushrooms (Maritimes and Quebec)		3.0	35.1	6.7	19.9	64.7

[a] some data not released by province or region so some numbers understate the size in that area
[b] discrepancy in total due to confidential data
[c] includes processing vegetables
[d] not reported for this area
[e] farm gate contracted and harvested, excluding potatoes
[f] not available by region
[g] includes producers that grow both vegetables and flowers

Sources: Statistics Canada cat. nos. 22-202, 22-203 and 22-204 and 1986 Census of Agriculture.



CANADA'S HORTICULTURAL PRODUCT TRADE

	1984	1985	1986	1987
Exports				
Vegetables (excluding potatoes)				
Value ($ mil.)	210.1	228.1	274.6	299.9
Potatoes and potato products				
Value ($ mil.)	100.7	96.1	114.6	132.2
Fruits and nuts				
Value ($ mil.)	105.2	104.7	139.0	156.1
Imports				
Vegetables (excluding potatoes)				
Value ($ mil.)	692.3	706.0	768.7	819.5
Potatoes and potato products				
Value ($ mil.)	54.2	46.0	48.7	63.3
Fruits and nuts				
Value ($ mil.)	1437.1	1475.4	1585.4	1 647.4

Source: Agriculture Canada, Canada's Trade in Agricultural Products, 1986

Major market: United States
Major competitor: United States
Major supplier: United States

FRESH FRUIT; PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, CANADA

	1984	1985	1986	Estimated 1987
Apples				
Production (tonnes)	434 248	478 606	388 176	479 765
Value ('000 dollars)	91 159[a]	115 608[a]	137 045[a]	
Average price (cents/kg)	20.99	24.16	35.30	
Apricots				
Production (tonnes)	2 323	2 274	2 335	2 997
Value ('000 dollars)	1 022	1 117a	1 115	
Average price (cents/kg)	43.99	49.12	47.75	
Blueberries				
Production (tonnes)	17 056	22 432	16 317	27 662
Value ('000 dollars)	13 167	20 312	19 844	
Average price (cents/kg)	77.20	90.55	121.62	

(continued)

FRESH FRUIT; PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, CANADA (Continued)

	1984	1985	1986	Estimated 1987
Cantaloupes				
Production (tonnes)	973	826	1 719	1 769
Value ('000 dollars)	675	620	1 019	
Average price (cents/kg)	69.37	75.06	59.28	
Cherries (Sweet and sour)				
Production (tonnes)	15 762	16 039	8 350	14 633
Value ('000 dollars)	11 824	14 904	8 703	
Average price (cents/kg)	75.02	92.92	104.23	
Cranberries				
Production (tonnes)	6 124	8 189	8 488	11 457
Value ('000 dollars)	8 141	13 847	16 930	16 626
Average price (cents/kg)	132.94	169.09	199.46	145.12

(continued)

FRESH FRUIT; PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, CANADA (Continued)

	1984	1985	1986	Estimated 1987
Grapes				
Production (tonnes)	94 208	76 636	89 218	85 632
Value ('000 dollars)	56 054[a]	44 558[a]	45 147[a]	44 692[a]
Average price (cents/kg)	44.72	46.86	44.88	48.75
Loganberries				
Production (tonnes)	30	30	33	
Value ('000 dollars)	62	62	65	
Average price (cents/kg)	206.67	206.67	196.97	
Peaches				44 616
Production (tonnes)	30 571	42 204	33 200	
Value ('000 dollars)	17 150	23 641[a]	19 720	
Average price (cents/kg)	56.10	56.02	59.40	

(continued)

FRESH FRUIT; PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, CANADA (Continued)

	1984	1985	1986	Estimated 1987
Pears				
Production (tonnes)	24 353	28 217	23 673	27 995
Value ('000 dollars)	9 763[a]	12 873[a]	11 670[a]	
Average price (cents/kg)	40.09	45.62	49.30	
Plums-Prunes				6 847
Production (tonnes)	5 391	6 339	6 239	
Value ('000 dollars)	2 977	3 936	3 560[a]	
Average price (cents/kg)	55.22	62.09	57.06	
Raspberries				21 507
Production (tonnes)	14 991	15 263	13 110	
Value ('000 dollars)	23 663	26 887	33 514	
Average price (cents/kg)	157.85	176.16	255.64	

(continued)

FRESH FRUIT; PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, CANADA (Concluded)

	1984	1985	1986	Estimated 1987
Strawberries				
Production (tonnes)	33 230	38 301	29 092	35 125
Value ('000 dollars)	38 412	46 355	42 717	
Average price (cents/kg)	115.59	121.03	146.83	
Total fruit				
Production (tonnes)	679 260	735 356	619 950	
Value ('000 dollars)	274 069[a]	324 720[a]	341 049[a]	

a Includes subsidy payments made by the Agricultural Stabilization Board according to the year of actual payment, and not the year of the program.

Source: Agriculture Canada, Horticulture and Special Crops Statistical Tables.

STABILIZATION PROGRAMS

Federal

Generally horticultural commodities are eligible for designation for support under the Agricultural Stabilization Act (ASA), on the recommendation of the Agricultural Stabilization Board and at the discretion of the government in providing appropriate funding. A tripartite program (federal-provincial-producer) cost shared plan is in place for apples covering all producing provinces.

Provincial

Provincial stabilization programs cover potato production in Quebec and apple production in Ontario. In British Columbia most horticultural products are eligible for provincial stabilization payments.

MAJOR ORGANIZATIONS

Canadian Horticulture Council
Contact: Mr. Danny Dempster
Executive Vice-President
310-1101 Prince of Wales Drive
Ottawa, Ont.
K2C 3W7
Tel: (613) 226-4187

Canadian Fruit Wholesalers' Association
Contact: Mr. Danny Dempster
Executive Vice-President
310-1101 Prince of Wales Drive
Ottawa, Ont.
K2C 3W7
Tel: (613) 226-4187

Canadian Food Processors' Association
Contact: Debra Bryanton
Director of Technical and Regulatory Affairs
Suite 1409
130 Albert Street
Ottawa, Ont.
K1P 5G4
Tel: (613) 233-4049

Canadian Frozen Food Association
Contact: Chris Kyte
Executive Director
1306 Wellington Street, Suite 303
Ottawa, Ontario
K1Y 3B2
Tel: (613) 728-6306

Flowers Canada
Contact: David Nodwell
Executive Director
Guelph, Ontario
N1H 2J7
Tel: (519) 823-2670

Canadian Nursery Trades Association
Contact: Chris Andrews
Executive Director
1293 Matheson Blvd.
Mississauga, Ontario
L4W 1R1
Tel: (416) 629-1367

SPECIAL CROPS

This sector includes forages, tobacco, pulses, sugar beets, mustard, buckwheat, canaryseed, and new crops. Forages by far are the most important. Each sub-commodity group has unique characteristics.

In 1987, the estimated farm gate value of special crops was almost $5 billion or equivalent to about 24% of total farm cash receipts.

Forages

This subsector includes annual and perennial grasses, legumes, fodder corn, and cereal crop residues.

Forages constitute the largest single crop sector in Canada, with production occupying 39% of the nation's agricultural land.

The vast majority of forage production is carried out as part of individual beef, dairy and other livestock operations, in the form of stored feed or grazed pasture.

Components	Stored feed Pasture Tamed hay	Forage seed Processed alfalfa

Area of production: 40.9 million hectares (including perennial species and grasslands and ranges)
Cultivated production occupies 11 million hectares of the total 40.9 million.

Stored feed and grazing

Production areas (1987): 6 211 300 ha
Value (1987): $3.4 billion ($1.9 billion as stored feed, $1.5 billion as grazed pasture)
Market: Domestic (produced and consumed within individual livestock operations)

Tamed hay

Production areas (1987)	5 752 200 ha	Exports (1987)	60 294 t ($7.7 million)
Value (1987)	$1.8 billion	Imports (1987)	110 750 t ($11.4 million)
Volume (1987)	30.8 million t		

Our largest trading partner in baled hay is the United States.

Forage seed

Production areas (1987)	58 000 ha, mostly in Saskatchewan and Alberta	Exports (1987)	34.9 million kilograms
Value (1987)	$451 million	Imports (1987)	13.9 million kilograms
Volume (1987)	46.4 million kilograms	Markets	Domestic, United States and EEC

Processed alfalfa

Production areas	Alberta and Saskatchewan (80%) remainder in B.C., Manitoba and Eastern Canada	Volume (1987)	497 000 t
		Exports (1987)	347 350 t
Value (1987)	$67.4 million	Markets	Domestic, Japan

Tobacco

Tobacco production and marketing is regulated through yearly quotas, licensed to buyers by provincial marketing boards.

Declining consumption and stiff competition from Zimbabwe have led to a decline in production, annual marketing quotas and land values in the tobacco sector in recent years.

Production areas (1987)	29 541 ha (Ontario 84%, Quebec 10%, remainder in Maritime Provinces)
Volume (1987)	61.3 million kilograms
Value (1987)	$242.5 million
Exports (1987)	26.6 million kilograms (30-40%)
Markets	Domestic (60%), United States, EEC and 40 other countries.

Pulses

This sector includes field peas, lentils, white pea beans, colored beans and fababeans.

Pulses are produced predominantly for the export market. Beans and peas are also consumed domestically. Pulses are now considered to be a major alternative in the Prairies for some crop substitution.

Production areas (1987)	556 733 ha Peas: primarily Manitoba, Saskatchewan and Alberta Lentils: primarily Saskatchewan Beans: primarily Ontario, Manitoba and Alberta
Value (1987)	$181.1 million
Volume	907 849 t
Exports (1987)	432 915 t $154 million
Imports (1987)	20 447 t
Markets	United States, EEC and 40 other countries

Sugar beets

Canadian sugar beet growers' market return is linked directly to the wholesale value of the sugar sold from their sugar beets.

Sugar beet growers are covered by a Tripartite Stabilization Program for ten years. The support price is based on 75% of their current cost of production plus 20% of the Margin between Market Return and Cost of Production for 15 years on a moving average basis.

Production areas (1987)	22 700 ha (Alberta 52%, Manitoba 48%)
Value (1987)	Approximately 24.7 million
Volume (1987)	989 000 t
Markets	Domestic (provides about 8% of Canadian requirements); export of by-products

Mustardseed

Mustardseed is produced under contract for foreign sales.

Production area (1987)	111 300 ha, primarily in Saskatchewan, Alberta and Manitoba
Value (1987)	$36.2 million
Volume (1987)	137 000 t of seed
Exports (1987)	131 713 t of seed ($40 million)
Markets	United States (yellow), EEC (brown), Japan (oriental)

Buckwheat

Buckwheat is grown mostly under contract. It is planted by growers that are experienced at growing this type of crop. China, Brazil and the United States are Canada's strongest competitors for the Japanese buckwheat market.

Production area (1987)	33 500 ha primarily in Manitoba and Quebec
Value (1987)	$11.1 million
Volume (1987)	44 100 t
Exports (1987)	15 836 t
Markets	Japan (84.7% of production, with purchases totaling $5.1 million in 1987)

Canaryseed

Canaryseed is produced almost exclusively under contract to Canadian dealers.

Production area (1987)	80 100 ha Production primarily in Saskatchewan (86%) and Manitoba (14%)
Value (1987)	$19.8 million
Volume (1987)	99 600 t
Exports (1987)	80 700 t
Markets	United States, EEC

Other special crops

Traditionally, the Canadian agri-food industry has produced such crops as ginseng, wild rice, safflower, coriander, confection sunflower and popping corn as relatively small but significant cropping alternatives.

In recent years, the sector has looked at introducing peanuts, chickpeas, evening primrose, Jerusalem artichoke, mung beans and caraway to diversify Canada's production abilities.

Commercialization of new crops is generally led by private entrepreneurs in response to perceived foreign or domestic markets.

Contract production and vertical integration are common in this sector.

Stabilization programs

While support is possible by designating individual special crops under the federal Agricultural Stabilization Act, given the relatively small values of such crops and their premium market, there is little demand for stabilization assistance (excluding sugar beets and beans for which Tripartite Stabilization is in place).

Major organizations

Canadian Seed Trade Association
Contact: W.C. Leask
Executive Vice-President
2948 Baseline Road, Suite 207
Ottawa, Ont.
K2H 8T5
Tel: (613) 829-9527

Canadian Seed Growers' Association
Contact: W.K. Robertson
Executive Director
P.O. Box 8455
Ottawa, Ont.
K1G 3T1
Tel: (613) 236-0497

Canadian Alfalfa Dehydrators' Association
Contact: Dale Pulkinen
Executive Secretary-Treasurer
Box 670
Tisdale, Sask.
S0E 1T0
Tel: (306) 873-4760

Secan
Contact: Larry White
Executive Director
885 Meadowlands Drive, Suite 512
Ottawa, Ont.
K2C 3N2
Tel: (613) 225-6891

Alberta Irrigated Alfalfa Producers Association
Contact: Peter Hansen
Chairman
P.O. Box 1876
Brooks, Alta.
T0J 0J0
Tel: (403) 362-2957

Canadian Forage Council
Contact: Jack Winch
P.O. Box 1455
Ottawa, Ont.
K1G 3T1
Tel: (519) 822-7718

Ontario Flue-cured Tobacco Growers' Marketing Board
Contact: Alvin Lindsay
Chairman
Box 70
Tillsonburg, Ont.
N4G 4H4
Tel: (519) 842-3661

Ontario Burley Tobacco Growers' Marketing Board
Contact: William Couture
Chairman
785 St. Clair Street Extension
R.R. 7
Chatham, Ont.
N7M 5J7
Tel: (519) 352-6710

Office des producteurs de tabac jaune du Québec
Contact: Alain Verbert
Vice-président
813 Rue Principale
C.P. 445
St-Thomas de Joliette, Que.
J0K 3L0
Tel: (514) 756-2640

Centre agricole coop de Lanaudière
Contact: Donald Roberge
Directeur général
839 Rue Papineau
Joliette, Que.
J6E 3Z9
Tel: (514) 759-4041

Prince Edward Island Tobacco Marketing Board
Contact: Bert Honkoop
Chairman
Main Street
P.O. Box 602
Montague, P.E.I.
C0A 1R0
Tel: (902) 368-5652

New Brunswick Tobacco Marketing Board
Contact: Normand Poirier
President
RR 1
P.O. Box 516
Buctouche, N.B.
E0A 1G0
Tel: (506) 743-2922

Nova Scotia Flue-cured Tobacco Growers' Marketing Board
Contact: Gerard Ansem
Chairman
Kentville Agricultural Centre
Kentville, N.S.
B4N 1J5
Tel: (902) 678-0533

Ontario Bean Producers' Marketing Board
White beans
Contact: Allan Simon
Chairman
P.O. 550
Lambeth, Ont.
N0L 1S0
Tel: (519) 652-3566

Canadian Tobacco Manufacturers' Council
Contact: William H. Neville
President
1808 Sherbrooke Street West, 2nd floor
Montreal, Que.
H3H 1E5
Tel: (514) 937-7428

Ontario Bean Dealers' Association
Colored beans - blacks, light red, dark-red kidney, cranberry, pintos, dutch brown, white kidney, great northerns
Contact: Peter Twynstra
President
1400 Bishop Street, Suite 106
Cambridge, Ont. N1R 6W8
Tel: (519) 622-3800

Manitoba Pulse Growers' Association
Peas, lentils, fababeans, edible beans, soybeans
Contact: Robert McCallister
President
RR 1, Box 68
Portage-la-Prairie, Man.
R1N 3A1
Tel: (204) 857-8092

Saskatchewan Pulse Crop Development Board
Contact: Ron McKinnon
Chairman
P.O. Box 46
Abernathy, Sask.
S0A 0A0
Tel: (306) 586-7006

Alberta Wheat Pool Bean Plant
Colored beans - pintos, small reds, pinks, great northerns
Contact: Ed White
General Manager
P.O. Box 96
Bow Island, Alta.
T0K 0G0
Tel: (403) 545-2662

Ontario Soy
Contact: Fred Brandenburg
Secretary-Manager
Box 1199
Chatham, Ont.
N7M 5L8
Tel: (519) 352-7730

Pulse Growers' Association of Alberta
Fababeans, peas, lentils, edible beans
Contact: V.L. (Lud) Pruder
President
P.O. Box 267
Bow Island, Alta.
T0K 0G0
Tel: (403) 381-5127
(403) 545-2619

Canadian Special Crops Association
Contact: Kirk De Groot
President
P.O. Box 3111
Winnipeg, Man.
R3C 4E6
Tel: (204) 949-1388

Alberta Sugar Beet Growers' Marketing Board
Contact: Paul Thibodeau
Chairman
3514-6th Avenue North
Lethbridge, Alta.
T1H 5C3
Tel: (403) 327-3242

Manitoba Sugar Beet Growers' Association
Canadian Sugar Beet Producers' Association
Contact: W.J. Siemens
President
P.O. Box 252
Gretna, Man.
R0G 0V0
Tel: (204) 324-8088

Western Canada Pulse Growers' Association
Contact: Donald J. Tait
40 Alberta Agriculture
Agriculture Center
Lethbridge, Alberta
T1J 4C7
Tel: (306) 378-2342

Major organizations do not exist for crops not covered by the preceding list.

FOOD AND BEVERAGE PROCESSING

The food and beverage processing industry is Canada's largest single manufacturing industry.

1985

Plants	3 532	Employment	223 900
Shipments	$44.7 billion	Share of total GDP	2.9%

FOOD AND BEVERAGE INDUSTRIES' SHARE OF ALL MANUFACTURING, BY REGION, 1985

Region	As percent of manufacturing value added	As percent of total shipments
Atlantic	28.5	30.9
Quebec	12.6	16.4
Ontario	11.0	11.6
Prairies	13.9	25.3
British Columbia	13.6	16.8
Canada	13.0	15.6

Source: Statistics Canada

TOTAL VALUE-ADDED, SHIPMENTS AND EMPLOYMENT, BY INDUSTRY, 1985

Industry	Value-added ($ mil.)	Shipments ($ mil.)	Employment ('000)
Food and beverage processing total[1]	13 930	44 710	223.9
Meat and poultry products	1 829	10 529	42.1
Fruits and vegetables	1 109	2 668	17.3
Dairy products	1 845	7 560	25.4
Flour, prepared cereal and feed	1 184	4 740	15.3
Vegetable oil mills (excluding corn)	118	1 294	1.2
Bakery products	1 297	2 655	27.9
Sugar and sugar confectionary	748	1 569	11.4
Other food products	1 942	4 943	24.4
Beverages	2 994	5 714	31.9

[1] Includes fish products

Source: Statistics Canada

LEADING CANADIAN FOOD AND BEVERAGE INDUSTRIES RANKED BY VALUE OF SHIPMENTS OF GOODS OF OWN MANUFACTURE, 1985

Rank	
1	Meat and meat products (excluding poultry)
2	Dairy products other than fluid milk
3	Fluid milk
4	Feed

Source: Statistics Canada, Manufacturing Industries of Canada, catalogue no. 31-203.

CANADA'S BEVERAGE INDUSTRY, 1985

Industry	Value-added ($ mil.)	Shipments ($ mil.)	Employment
Total	2 993.9	5 713.5	31 903
Soft drinks	960.9	2 397.8	12 372
Distillery products	494.6	848.0	4 454
Brewery products	1 405.4	2 205.2	13 656
Wine	133.0	262.6	1 421

Source: Statistics Canada

TRADE ORIENTATION OF CANADA'S BEVERAGE PROCESSING INDUSTRIES, 1986

Industry	Export orientation[1] (%)	Import penetration[2] (%)
Total	10.4	10.1
Soft drinks	1.0	3.5
Distilleries	39.3	25.1
Breweries	8.2	0.9
Wineries	1.0	54.9

1 Export orientation is calculated as the percentage of Canadian beverage exports to total shipments by Canadian manufacturers.

2 Import penetration is calculated as the percentage of beverage imports to the total Canadian market (shipments minus exports plus imports).

Source: Regional Industrial Expansion

RETAIL FOOD/PRICES

Total food sales (1987)	$38 billion, about 25% of total Canadian retail sales
Retail food stores (1987)	34 268
Employment (1987)	339 000 (includes part-time)

CONSUMER EXPENDITURES ON AGRI-FOOD PRODUCTS, 1987

Item	Expenditures ($ mil.)	Percent of personal disposable income
Total food	[1]	14.5
Prepared at home	37 881.0	10.4
Eaten away from home	[1]	4.1
Alcoholic beverages	9 543.0	2.6
Tobacco products	6 752.0	1.9
Total agri-food products	69 156.5	19.0

[1] Confidential

Source: Statistics Canada

EXPENDITURES ON FOOD, BEVERAGES AND TOBACCO AS A PERCENTAGE OF PERSONAL DISPOSABLE INCOME, SELECTED COUNTRIES, 1985

United States	12.9
Canada	15.3
Netherlands	16.4
United Kingdom	17.6
Japan	18.6
France	19.0
Germany	20.0
Belgium	21.3
Austria	21.3

Source: OECD

CHANGES IN CANADIAN CONSUMER PRICE INDEXES FOR FOOD

Year	Percent change over previous year
1980	10.7
1981	11.4
1982	7.2
1983	3.7
1984	5.6
1985	2.9
1986	5.0
1987	4.4

Source: Statistics Canada

CONSUMER PRICE INDEX FOR FOOD, SELECTED COUNTRIES

Country	Percent change 1987/1986
Canada	4.4
United States	4.2
Japan	0.9
France	3.1
Germany	–0.4
Sweden	3.2
United Kingdom	3.5

Source: Organization for Economic Co-operation and Development (OECD), Main Economic Indicators, Paris

FOODSERVICE

Total sales (1987)	$21.0 billion
Establishments	50 000
Employment	593 000

The average Canadian dines out 140 times per year and spends about $742.

In 1986 Canadians spend 35.5% of their food dollars in restaurants and foodservice establishments.

FOODSERVICE INDUSTRY SALES BREAKDOWN, 1987

Sector	($ mil.)	Percent change 1987/1986
Restaurants, licenced	6 164	5 5
Restaurants, unlicenced	4 003	8.8
Takeout	1 769	16.3
Caterers	1 097	15.2
Taverns	996	6.2
Accommodation foodservice	2 891	4 2
Motion picture theaters	95	5.8
Vending	202	5.7
Department stores	239	-3.7
Other retail foodservice	303	5.0
Institutional	3 245	3.0
Total	$21.0 billion	6.8

Source: Canadian Restaurant and Foodservice Association

DOMESTIC CONSUMPTION

APPARENT PER-CAPITA CONSUMPTION OF FOOD IN CANADA (kg)

Commodity	1980	1985	1986	1987	Commodity	1980	1985	1986	1987
Cheddar cheese	2.12	2.52	2.67	2.79	Fruit[4,5]				
Fluid milk and cream[1]	109.86	106.07	101.59	104.20	Fresh	60.95	60.15	63.66	–
Margarine	5.38	6.45	6.14	–	Canned	17.00	19.59	19.29	–
Creamery butter	4.52	4.05	3.97	–	Frozen	1.32	1.17	0.94	–
Wheat flour	59.31	60.48	59.63	62.63	Juice	43.20	36.61	38.77	–
Meat (red)[2]	74.92	71.70	71.86	70.11	Vegetables[4,6]				
Chicken[3]	17.19	19.66	20.49	21.72	Fresh	122.66	121.60	138.11	–
Eggs	12.86	11.96	11.77	11.50	Canned	10.36	2.66	3.96	–
					Frozen	6.23	5.97	6.75	–
					Sugar	39.57	43.07	42.55	40.79

[1] Litres
[2] Carcass weight
[3] Eviscerated weight
[4] Fresh equivalent
5 Includes citrus, other fruit and tomatoes
6 Includes potatoes, mushrooms and other vegetables

Source: Statistics Canada

INTERNATIONAL TRADE

Exports

From 1969 to 1987, the value of Canada's agricultural exports grew from $1.2 billion to $8.9 billion.

The decline of these exports over the 1984-87 period from $10.3 to $8.9 billion reflected unfavourable climate conditions on the prairies and the more competitive conditions facing exporters in the international commodity markets.

In spite of this decline, agricultural export sales in 1987 were equivalent to 42.6% of Canada's $20.9 billion in farm cash receipts.

Since 1980, Canada has consistently exported between 40-50% of its agricultural production.

Except for those products under supply management (poultry and dairy), most of Canada's commodities are subject to world price competition in both domestic and export markets.

In 1987, agricultural products make up 7.3% of total exports.

FOUR-YEAR COMPARISON OF CANADIAN AGRICULTURAL EXPORTS, BY REGION ($ mil.)

Region	1984	1985	1986	1987	Region	1984	1985	1986	1987
Western Europe	1 201	932	1 016	1 009	Oceania	41	27	30	26
EEC[1]	1 053	802	949	900	South America	468	344	309	389
Eastern Europe	2 266	1 660	1 143	793	Brazil	339	191	150	140
USSR	2 021	1 496	953	701	Central America	445	435	489	472
North America	2 239	2 432	2 665	2 852					
U.S.	2 235	2 429	2 660	2 848	Total	10 323	8 888	8 401	8 886
Asia	2 615	2 284	2 104	2 557					
Japan	1 398	1 298	1 182	1 126	Developed	4 944	4 740	4 963	5 076
China	647	479	411	741	Developing	2 212	1 783	1 604	2 054
Middle East	631	441	421	556	Centrally planned	3 164	2 364	1 834	1 757
Africa	418	331	222	232					

[1] Includes Greece from 1984 and Spain and Portugal from 1986

Source: Agriculture Canada, Canada's Trade in Agricultural Products,1985, 1986 and 1987

TOP FIVE MARKETS FOR CANADIAN AGRICULTURAL EXPORTS ($ bil.)

	1984	1985	1986	1987
United States	2.24	2.43	2.66	2.85
USSR	2.02	1.50	0.95	0.70
Japan	1.40	1.30	1.18	1.13
EEC[1]	1.05	0.80	0.95	0.90
China	0.65	0.48	0.41	0.74
Top five total	7.36	6.51	6.14	6.32
Total for all countries	10.32	8.89	8.40	8.89
Top five share (%)	71	73	73	71

[1] Includes Greece from 1984 and Spain and Portugal from 1986

Source: Canada's Trade in Agricultural Products, 1985, 1986 and 1987

CANADA'S LEADING AGRICULTURAL EXPORT COMMODITIES, 1987

	Value ($ mil.)	Percent of total agricultural exports
Grains	3 779	42.5
Red meats	1 065	12.0
Oilseeds	735	8.3
Other animal products	588	6.6
Live animals	326	3.7
Vegetables (excluding potatoes)	300	3.4
Grain products (food)[1]	266	3.0
Oilseed products	223	2.5
Dairy products	145	1.6

[1] Excludes cornmeal and flour, malt, oatmeal and rolled oats, wheat and flour except hard spring wheat and flour values as of 1980, due to confidentiality

Source: Canada's Trade in Agricultural Products, 1985, 1986 and 1987

Imports

Since 1980, Canada has consistently imported between 5 and 7 billion worth of agricultural products – with a resulting agricultural trade surplus of $2-4 billion.

Total agricultural imports for 1987 were valued at $6.8 billion.

FOUR-YEAR COMPARISON OF CANADIAN AGRICULTURAL IMPORTS, BY REGION ($ mil.)

Region	1984	1985	1986	1987
Western Europe	734	783	844	878
EEC[1]	564	608	740	768
Eastern Europe	16	16	21	29
USSR	2	3	3	4
North America	3 610	3 431	3 638	3 891
U.S.	3 610	3 431	3 638	3 891
Asia	439	403	463	451
Japan	39	32	40	36
China	44	55	118	116

(continued)

FOUR-YEAR COMPARISON OF CANADIAN AGRICULTURAL IMPORTS, BY REGION ($ mil.) (Concluded)

Region	1984	1985	1986	1987
Middle East	29	30	45	44
Africa	171	153	173	140
Oceania	291	332	412	413
South America	459	530	569	549
Brazil	228	283	247	240
Central America	363	338	441	371
Mexico	79	84	102	96
Total	6 112	6 017	6 607	6 767
Developed	4 785	4 724	5 075	5 333
Developing	1 222	1 202	1 350	1 271
Centrally planned	105	91	182	163

[1] Includes Greece from 1984 and Spain and Portugal from 1986

Source: Agriculture Canada, Canada's Trade in Agricultural Products, 1985, 1986 and 1987

MAJOR SUPPLIERS OF CANADA'S AGRICULTURAL IMPORTS, 1987

	Sales ($ mil.)	Market share (%)
United States	3 891	57.5
EEC (including U.K.)[1]	768	11.3
Australia	246	3.6
Brazil	240	3.5
New Zealand	166	2.4
Mexico	96	1.4

[1] Includes Greece, Spain and Portugal

Source: Canada's Trade in Agricultural Products, 1985, 1986 and 1987

CANADA'S MAJOR AGRICULTURAL IMPORTS, 1987

	Value ($ mil)	Percent of total agricultural imports
Fruits and nuts	1 647	24.3
Plantation crops	838	12.4
Vegetables (excluding potatoes)	820	12.1
Other agricultural products	738	10.9
Red meats	488	7.2
Other animal products	437	6.4
Oilseed products	350	5.2
Sugar	234	3.4
Grain products (food)	209	3.1
Grains	91	1.4

Source: Canada's Trade in Agricultural Products, 1985, 1986 and 1987

CANADA'S AGRICULTURAL AND TOTAL TRADE BALANCES ($ bil.)

	1983	1984	1985	1986	1987
Agriculture	4.32	4.21	2.87	1.79	2.12
Total	12.92	13.59	11.23	3.91	5.39

Source: Agriculture Canada, Canada's Trade in Agricultural Products, 1985, 1986 and 1987

AGRICULTURAL AND TOTAL TRADE, CANADA, BY MAJOR COUNTRY GROUPINGS, 1981-1987 (millions of dollars)

Year	Developed countries[a] Total Agricultural	Developed countries[a] Total All commodities	Developed countries[a] EEC[b] Agricultural	Developed countries[a] EEC[b] All commodities	Centrally planned economies[c] Agricultural	Centrally planned economies[c] All commodities	Developing countries[d] Agricultural	Developing countries[d] All commodities	All countries Agricultural	All countries All commodities	Agricultural trade as a % of total trade
Exports											
1981	4 229	69 947	1 383	8 821	3 166	3 811	1 389	7 578	8 783	81 337	10.8
1982	4 390	70 206	1 238	7 378	3 288	4 130	1 627	7 488	9 304	81 825	11.4
1983	4 427	77 794	1 142	6 621	3 160	4 100	1 916	6 613	9 505	88 506	10.7
1984	4 944	97 587	1 053	6 891	3 165	4 083	2 213	7 766	10 323	109 436	9.4
1985	4 740	105 357	848	6 852	2 364	3 508	1 783	7 280	8 888	116 145	7.6
1986	4 963	106 310	949	7 804	1 834	3 057	1 604	7 221	8 401	116 588	7.3
1987	5 076	110 416	900	9 109	1 757	2 711	2 054	8 335	8 886	121 462	7.3

(continued)

AGRICULTURAL AND TOTAL TRADE, CANADA, BY MAJOR COUNTRY GROUPINGS, 1981-1987 (millions of dollars) (Continued)

Year	Developed countries[a] Total Agricultural	Developed countries[a] Total All commodities	Developed countries[a] EEC[b] Agricultural	Developed countries[a] EEC[b] All commodities	Centrally planned economies[c] Agricultural	Centrally planned economies[c] All commodities	Developing countries[d] Agricultural	Developing countries[d] All commodities	All countries Agricultural	All countries All commodities	Agricultural trade as a % of total trade
Imports											
1981	4 361	67 843	388	6 502	254	764	995	10 875	5 610	79 482	7.1
1982	4 031	59 392	379	5 709	120	539	904	7 925	5 056	67 856	7.5
1983	4 087	66 953	427	5 959	92	552	1 006	8 081	5 185	75 587	6.9
1984	4 784	85 264	564	8 248	105	702	1 222	9 876	6 112	95 842	6.4
1985	4 724	94 114	685	10 804	91	743	1 202	10 057	6 017	104 914	5.7
1986	5 075	101 185	740	12 812	182	973	1 350	10 520	6 607	112 678	5.9
1987	5 333	102 813	768	13 512	163	1 209	1 271	12 503	6 767	116 076	5.8

(continued)

AGRICULTURAL AND TOTAL TRADE, CANADA, BY MAJOR COUNTRY GROUPINGS, 1981-1987 (millions of dollars) (Concluded)

Year	Developed countries[a]				Centrally planned economies[c]		Developing countries[d]		All countries		Agricultural trade as a % of total trade
	Total		EEC[b]								
	Agricultural	All commodities	Agricultural	All commodities	Agricultural	All commodities	Agricultural	All commodities	Agricultural	All commodities	
Surplus or (deficit)											
1981	(131)	2 104	995	2 319	2 912	3 047	394	(3 297)	3 173	1 855	171.0
1982	359	10 814	859	1 669	3 168	3 592	723	(437)	4 248	13 969	30.4
1983	340	10 841	715	662	3 068	3 548	910	(1 468)	4 320	12 919	33.4
1984	160	12 323	489	(1 357)	3 060	3 381	991	(2 110)	4 211	13 594	31.0
1985	16	11 243	163	(3 952)	2 273	2 765	581	(2 777)	2 871	11 231	25.6
1986	(112)	5 125	209	(5 008)	1 652	2 084	254	(3 299)	1 794	3 910	45.9
1987	(257)	7 603	132	(4 403)	1 594	1 502	783	(3 718)	2 119	5 386	39.3

Footnotes

[a] Includes EEC, Gibraltar, Malta, Austria, Finland, Greece, Iceland, Norway, Portugal, Spain, Sweden, Switzerland, Israel, South Africa, Japan, Australia, New Zealand, Puerto Rico, Greenland, St. Pierre and Miquelon and United States.

[b] Includes Belgium, Luxembourg, France, Italy, West Germany, Netherlands, United Kingdom, Ireland, Denmark and Greece from 1981, and Spain and Portugal from 1985.

[c] Includes Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania, USSR, Yugoslavia, People's Republic of China, and Cuba.

[d] Includes all other countries.

Source: Agriculture Canada, Policy Branch, Handbook of Selected Agricultural Statistics.

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars)

Year	Developed countries[a]									
		EEC[b]								
	U.S.	U.K.	Nether-lands	Italy	West Germany	Other	Japan	Australia	New Zealand	Other
Exports										
1981	1 260	618	208	244	184	129	1 345	28	9	204
1982	1 606	502	197	241	120	178	1 246	22	7	271
1983	1 736	433	187	194	152	176	1 296	27	8	218
1984	2 235	357	216	146	167	167	1 398	27	13	218
1985	2 429	346	95	81	149	177	1 298	19	8	138
1986	2 660	285	123	135	159	247	1 182	23	6	143
1987	2 848	226	131	122	165	256	1 126	20	5	177

(continued)

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars) (Continued)

Year	Centrally planned economies[c]				Developing countries[d]		
	USSR	China	Cuba	Other	Brazil	Mexico	Other
Exports							
1981	1 762	713	346	345	247	192	950
1982	1 917	743	242	386	276	102	1 249
1983	1 646	941	294	279	327	93	1 496
1984	2 021	647	252	245	339	94	1 780
1985	1 496	479	225	164	191	100	1 492
1986	953	411	280	190	150	95	1 359
1987	701	741	222	93	140	139	1 175

(continued)

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars) (Continued)

Year	Developed countries[a]									
		EEC[b]								
	U.S.	U.K.	Nether-lands	Italy	West Germany	Other	Japan	Australia	New Zealand	Other
Imports										
1981	3 264	117	78	32	48	113	23	278	129	279
1982	3 060	109	64	39	47	120	26	231	122	213
1983	3 118	113	78	44	46	146	29	181	141	191
1984	3 610	133	101	49	72	209	39	185	105	281
1985	3 431	152	112	55	87	279	32	190	138	248
1986	3 638	177	116	64	106	277	40	266	144	247
1987	3 891	190	131	67	97	283	36	246	166	226

(continued)

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars) (Continued)

Year	Centrally planned economies[c]				Developing countries[d]		
	USSR	China	Cuba	Other	Brazil	Mexico	Other
Imports							
1981	1	60	177	16	184	92	719
1982	1	36	71	12	201	78	625
1983	1	39	39	13	198	76	732
1984	2	44	45	14	228	79	915
1985	3	55	20	13	283	84	835
1986	3	118	43	18	247	102	1 001
1987	4	116	18	25	240	96	935

(continued)

AGRICULTURAL TRADE, CANADA, BY COUNTRIES,

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars) (Continued)

Year	Developed countries[a]									
		EEC[b]								
	U.S.	U.K.	Nether-lands	Italy	West Germany	Other	Japan	Australia	New Zealand	Other
Surplus or (deficit)										
1981	(2 004)	501	130	212	136	16	1 322	(250)	(120)	(75)
1982	(1 454)	393	133	202	73	58	1 220	(209)	(115)	58
1983	(1 382)	320	109	150	106	30	1 267	(154)	(133)	27
1984	(1 375)	224	115	97	95	(42)	1 359	(158)	(92)	(63)
1985	(1 002)	194	(17)	26	62	(102)	1 266	(171)	(130)	(110)
1986	(978)	108	7	71	53	(30)	1 142	(243)	(138)	(104)
1987	(1 043)	36	–	55	68	(27)	1 090	(226)	(161)	(49)

(continued)

AGRICULTURAL TRADE, CANADA, BY COUNTRIES, 1981-1987 (millions of dollars) (Concluded)

Year	Centrally planned economies[c]				Developing countries[d]		
	USSR	China	Cuba	Other	Brazil	Mexico	Other
Surplus or (deficit)							
1981	1 761	653	169	329	63	100	231
1982	1 916	707	171	374	75	24	624
1983	1 645	902	255	266	129	17	764
1984	2 019	603	207	231	110	15	866
1985	1 493	424	205	151	(92)	16	657
1986	950	293	237	172	(97)	(7)	358
1987	697	625	204	68	(100)	43	840

AGRICULTURAL TRADE, CANADA, BY COUNTRIES.

Footnotes

[a] Includes EEC, Gibraltar, Malta, Austria, Finland, Greece, Iceland, Norway, Portugal, Spain, Sweden, Switzerland, Israel, South Africa, Japan, Australia, New Zealand, Puerto Rico, Greenland, St. Pierre and Miquelon and United States.

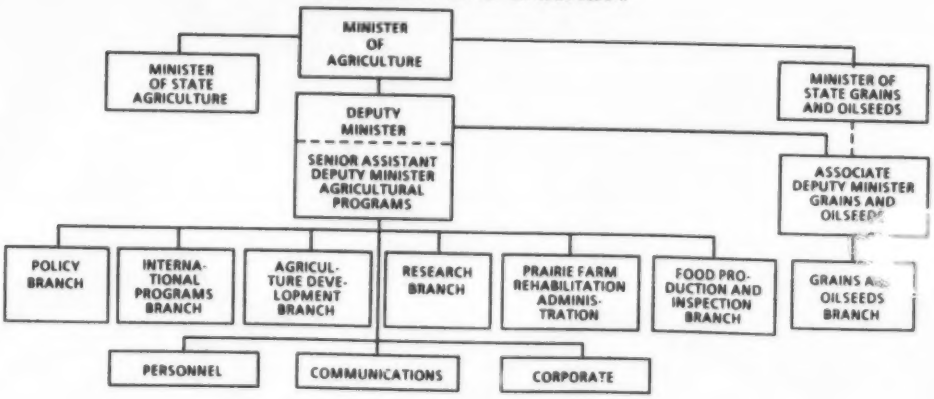
[b] Includes Belgium, Luxembourg, France, Italy, West Germany, Netherlands, United Kingdom, Ireland, Denmark and Greece from 1981, and Spain and Portugal from 1985.

[c] Includes Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania, USSR, Yugoslavia, People's Republic of China, and Cuba.

[d] Includes all other countries.

Source: Agriculture Canada, Policy Branch, Handbook of Selected Agricultural Statistics.

AGRICULTURE CANADA



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